

SIS 2000+ Training Manual

Entering Food Service Meal Rates

Purpose

This program is used to set prices for first (reimbursable) and second (additional, non-reimbursable) meals for different consumer configurations such as Breakfast Student Free, or Lunch Faculty Worker. District reimbursement rates are also set for each meal rate. In addition, reimbursable Milk rates may be set if your district participates in the Special Milk Program.

Rates may be set on a district-wide basis per school type, or may be set independently for standalone schools. Meal Rates must be present before food items may be entered.

Important** If *Replication* is to be implemented, **Rates** and **Items** **MUST** be completed using the District-wide database only.

The Rates module also contains the capability to identify taxable consumers and food items. This information is used to produce District Sales Tax Payable Reports.

Training Objectives

- Enter District Meal Rates
- Enter District Reimbursement Rates
- Enter School Meal Rate Exceptions (for individual schools that may use a rate other than the district rate, including reimbursement rates)
- Enter Rates for a standalone school
- Enter Sales Tax Rates, identify Taxable Consumers (optional)
- Understand the function of Rate Change records
- Understand how to change a rate mid-year

Accessing Food Service Rates

From the SchoolNet Main Menu click on the Food Service button. From the Food Service menu click on the **Rates** button (or Alt-R on the keyboard)

For further information refer Help:

Available through the NeTel website at:
<http://www.netel.com/webdoc/default.htm>

Tasks

Add a District Rate

If Rates are being entered for a standalone system, treat the school as a self-contained district. School Exception Rates do not apply.

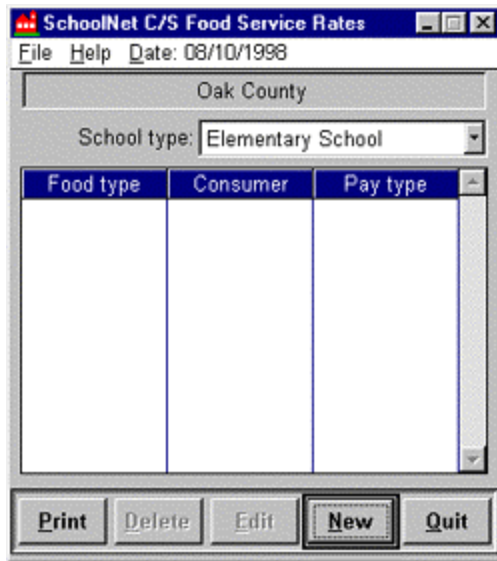


Fig. 1 – Food Service Rates, no Rates present

From within Rates (Fig. 1):

Select **School Type** for this Rate

Click on the **New** button to run the Rate Editor and add a rate (Fig. 2)

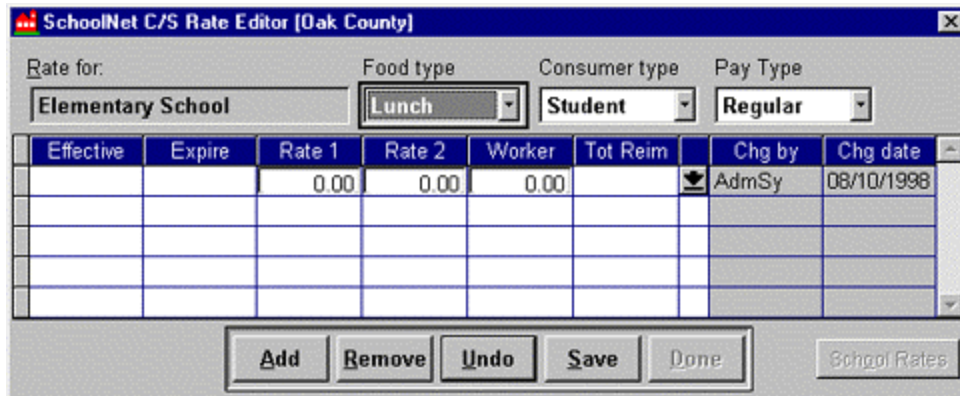


Fig. 2 – Rate Editor, new Rate, default data

Add a District Rate (continued)

Enter data for this rate, pressing Tab to move to each field

Food type (Lunch, Breakfast, or Milk, only *if* Milk is a reimbursable food item--SMP)

Consumer Type (Student, Faculty, Patron or Visitor)

Pay Type (Free, Reduced, Paid)

Rate Effective and Expire dates *

Rate 1 (the cost of the first, reimbursable meal for this consumer configuration)

Rate 2 (the cost for a same day additional meal for this consumer configuration)

Worker Rate (the cost of an earned meal for this consumer configuration)

Reimbursement Rates (the District Reimbursement Rate for each meal served to this consumer configuration)

Enter a Reimbursement Rate

From the above Rate Editor screen, with the District Rate in edit mode, click on the **Tot Reim** drop down list box.

Complete rates for the programs that apply to your district (Fig. 3). Programs that appear here may be added or deleted through the Food Service Programs Table, Table Editor, System.

Click on the **Done** button to return to the Rate Editor screen.

Program	Rate
Federal	0.2000
State	0.0000
Commodity Meals	0.0000
Severe Needs	0.0000
Special Milk	0.0000
Save	Cancel
	0.2000

Fig. 3 – Reimbursement Rates

SchoolNet C/S Rate Editor (Oak County)								
Rate for:		Food type	Consumer type	Pay Type				
Elementary School		Lunch	Student	Regular				
Effective	Expire	Rate 1	Rate 2	Worker	Tot Reim	Chg by	Chg date	
08/24/1998	06/02/1999	1.00	1.85	0.00	0.2000	AdmSy	08/10/1998	

Add Remove Undo Save Done School Rates

Fig. 4 – Completed District Rate for Middle School Lunch Student Free

A **District Rate** has now been set for this specific Meal configuration (for example, *Elementary Student Paid Lunch*). If this rate is used by **all elementary** schools in the district (it is considered a district-wide rate), including Worker Meals and the Reimbursement Rate, you are finished with this rate and may proceed to the next rate (Fig. 4).

Click on the **Done** button (Rate Editor screen) to return to Food Service Rates

Click on the **Add** button to add the next new District rate (Fig. 5)

If there are **any** schools of this School Type in the district that use a different rate for *Student Full-Pay Lunch*, including Worker Meals and the **Reimbursement Rate**, proceed to Set School Exceptions for this rate.

If rates are being set district-wide, rates must be present for all school types. School types for a typical district are pre-kindergarten, elementary, middle and high school.

Food type	Consumer	Pay type
Lunch	Student	Free
Lunch	Student	Reduced
Lunch	Student	Regular
Lunch	Faculty	Regular
Lunch	Adult	Regular
Lunch	Child	Regular
Breakfast	Student	Free
Breakfast	Student	Reduced
Breakfast	Student	Regular

Fig. 5 - Typical Meal Rate configurations

Typical Meal Rate configurations are:

Lunch

Student Free, student Reduced, Student Paid, Faculty, Faculty Worker, Visitor Adult, and Visitor Child. If the Patron consumer type is used, possible rate configurations are Student Patron Free, Student Patron Reduced, Student Patron Paid, Patron Adult, and Patron Child

Breakfast

Student Free, student Reduced, Student Paid, Faculty, Faculty Worker, Visitor Adult, and Visitor Child. If the Patron consumer type is used, possible rate configurations are Student Patron Free, Student Patron Reduced, Student Patron Paid, Patron Adult, and Patron Child

Milk

A Rate configuration for Milk should only be present if:

1. Milk is a reimbursable food item (Special Milk Program milk). If you choose to include Milk as a potentially reimbursable item, remember that a rate for milk must be present for each potential consumer.
2. Milk is not a reimbursable food item, but you prefer Milk sales to appear on Meal Detail and Summary reports. If milk is present as an ala Carte food item, milk sales appear on ala Carte Detail and Summary reports.

Understand Rate Change Records

Rules for Rate Change Records:

Meal rates, Milk rates (if milk is treated as a Meal Item and not an ala Carte Item), Reimbursement rates and Sales Tax rates all use Change Records to establish specific time frames (*effective and expire dates*) for each rate. This allows rates to change mid-year without affecting historical reporting, and also maintains a history for each rate.

The following applies to **Rate Change Records**:

Effective and *Expire* Dates are **not** required unless a rate changes. If these dates are not present, the system assumes the rate is in effect.

If a rate changes, only the *Expire* Date is required to close the current rate. The *Effective* Date is optional.

To place a new rate in effect, only the new *Effective* Date is required. The *Expire* Date for the new rate is optional.

It is recommended that both the *Effective* and *Expire* Dates are included when a rate is entered to promote consistency and to avoid inadvertently using an incorrect rate at the start of a new school year. Also, assigning both dates to a rate produces concise Rates Reports with clearly defined periods of coverage for each rate (Fig. 6).

The screenshot shows the 'SchoolNet C/S Rate Editor (Oak County)' window. It has a header section with four dropdown menus: 'Rate for:' (set to 'Elementary School'), 'Food type' (set to 'Lunch'), 'Consumer type' (set to 'Student'), and 'Pay Type' (set to 'Reduced'). Below this is a table with the following columns: 'Effective', 'Expire', 'Rate 1', 'Rate 2', 'Worker', 'Tot Reim', 'Chg by', and 'Chg date'. The table contains two rows of data:

Effective	Expire	Rate 1	Rate 2	Worker	Tot Reim	Chg by	Chg date
08/24/1998	12/31/1998	0.40	1.85	0.00	1.6100	AdmSy	08/10/1998
01/01/1999	06/02/1999	0.00	1.85	0.00	1.6100	AdmSy	08/10/1998

At the bottom of the window are buttons for 'Add', 'Remove', 'Undo', 'Save', 'Done', and a 'School Rates' button.

Fig. 6 – Meal Rate containing a Rate Change record

Set a **School** Exception to this District Rate

With the District Rate in read-only mode Click on the **School Rates** button to run the School Rates Editor (Fig. 7).

Effective	Expire	Rate 1	Rate 2	Worker	Tot Reim	Chg by	Chg date
08/26/1997	03/31/1998	0.30	1.85	0.00	1.5100	AdmSy	03/27/1998
04/01/1998	06/19/1998	0.00	1.85	0.00	1.5100	AdmSy	03/27/1998

Fig. 7 – School Rates Exceptions button

Set a **School** Exception to this District Rate (continued)

Select the School that uses a rate other than the district rate for this meal
Click the **Edit** button

Set School Rate Exceptions

Select the Rate that is the exception to the district rate for this meal

Click the **Exception** button

Select 'Yes' from the exception confirmation prompt

Modify the default district meal or milk rate

Reimbursement Rate Exceptions

Click on the **Tot Reim** drop down list box for the rate

Select Reimbursement Program

Enter reimbursement Rate

Click the **Save** button (reimbursement rate screen)

Click the **Done** button (reimbursement rate screen)

SchoolNet C/S Rate Editor [Oak County]

Rate for: **Middle School** Food type: **Lunch** Consumer type: **Student** Pay Type: **Reduced**

Effective	Expire	Rate 1	Rate 2	Worker	Tot Reim	Chg by	Chg date
08/26/1997	03/31/1998	0.00	1.85	0.00	1.5100	AdmSy	03/27/1998
04/01/1998	06/19/1998	0.30	1.85	0.00	1.5100	AdmSy	03/27/1998

Add Remove Edit Save Done School Rates

Schgol: **Oakridge Middle School**

■ = Default values ■ = Exceptions

Effective	Expire	Rate 1	Rate 2	Worker	Tot Reim	Chg by	Chg date
08/26/1997	03/31/1998	0.00	1.85	0.00	1.5100	AdmSy	03/27/1998
04/01/1998	06/19/1998	0.30	1.85	0.00	1.5100	AdmSy	03/27/1998

Exception Default Edit Save Done

Fig. 8 – Completed School Exception Rate

The example in Fig. 8 shows a school which uses a rate other than the district rate of "0.00" for Student Reduced Lunch for the date range 04/04/98 through 06/19/98. This school uses instead a rate of "0.30" for this meal. The District Rate is displayed at the top of the screen. The School Exception Rate displays at the bottom of the screen. Notice that the **District Rate displays in blue**, and an **Exception Rate displays in Red**.

Set a **School** Exception to this District Rate (continued)

Default button –

this button reinserts District Default Rates. Select a School Exception Rate (click on), then click on the **Default** button.

Undo button –

this button “Undoes” current unsaved changes and reverts (for this school only) back to the last saved version.

Done button (School Exception Rates Editor screen) –

Use the **Done** button to return to the District Rate screen

Click the **Done** button (District Rates screen) to return to Food Service Rates

Add Sales Tax Rates

Complete Sales tax rates and Sales tax assign if your district collects and reports tax collected on the sale of food items. This information is used to produce District Sales Tax Payable Reports.

**** Note **** This feature assumes tax is included in the price of meals and ala Carte food items.

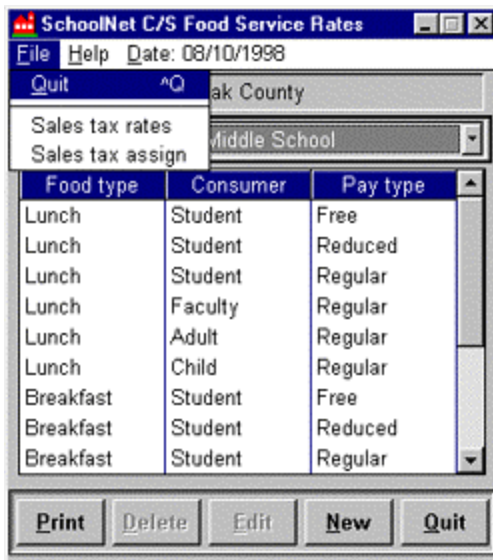


Fig. 9 – Rates File menu, Sales tax rates and Sales tax assign

From within Rates, click on the File Menu (or Alt-F on the keyboard)

Click on **Sales tax rates** (Fig. 9).

Add Sales Tax Rates (continued)

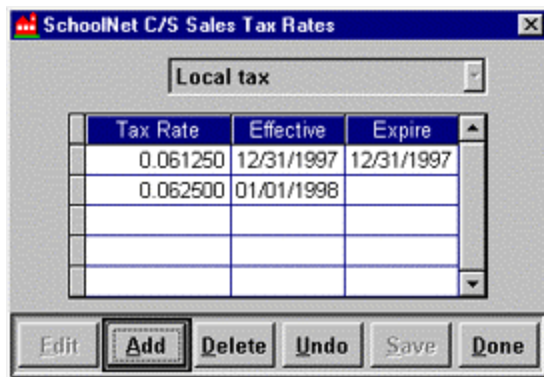


Fig. 10 - Sales Tax Rates screen

Select **Tax Program** (State tax, example Fig. 10). Sales tax Programs may be added and deleted in the 'zsaletax' Table, Table Editor, System module.

Click on the **Edit** button to place rates for this tax type into edit mode

Click on the **Add** button to add a rate for this tax type

Enter Tax Rate

Enter Effective and Expire dates

Click on the **Save** button

Click on the **Done** button to return to Food Services Rates

The example in Fig. 10 shows a tax rate with a rate change present. Notice that the current rate does not have an expiration date, indicating the new rate remains in effect unless another rate change is recorded.

Identify Taxable Consumers

From within Rates, click on the File Menu (or Alt-F on the keyboard)

Click on **Sales tax assign** (Fig. 9)

Identify food items for taxable consumers

Click on the **Save** button

Click on the **Done** button to return to Food Services Rates

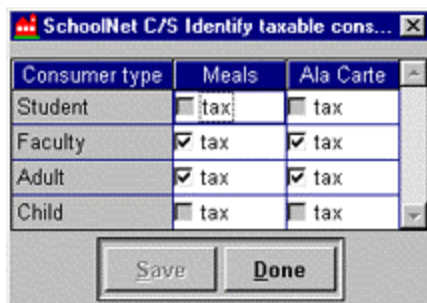


Fig. 11 - Identify taxable consumers and taxable food items

Change a rate mid-year

Meal, Reimbursement and Tax rates are controlled by effective and expire dates. Should a rate change, edit the current rate and change the expiration date to the last date this rate is in effect. Then add the new rate with new effective and expire dates.

Effective and Expire Dates have not been used for existing rates? All that needs to be done is:

- Enter an expiration date for the old rate

- Click on the Add button

- Enter the new rate, with the effective date as of the first day this rate is in effect

- Save